University of Massachusetts UMASS Medical School

UMMS 2016 BuyWays Step by Step Training Guide

UMMS BuyWays Help Desk: 6-3900 or **email:** BuyWays@umassmed.edu

1) Getting Started – Shopper Role Starts Here

LOGIN to BUYWAYS

- Click the New BuyWays Test Environment on the HR Learning and Development/Employee Training/BuyWays Training website (at bottom of Web page)
- Login to BuyWays using your **Shopper Username – i.e. wtrn8** and **password - password**
- When an official User, login to BuyWays site w/ network ID and password

2) Profile Set Up

UPDATE PERSONAL INFORMATION

- Click on your name (i.e. it would say **Worcester Shopper8** on Test site if login was wtrn8) at the top right of the screen, and then View My Profile
- Click on the link to the information that you want to modify
- Review/Edit any information
- Click Save before clicking on another tab (all pages may not have Save)
- Review the Update Your Profile on the HR Learning & Development Training site for additional instructions on updating your profile default settings

3) Shopping – Creating a Cart

HOSTED SUPPLIER CATALOGS

- From Shopping Home page
- Use the **Shop** bar at the top, enter search term, then click Go
- For more search options click on the Advanced Search
- Click the Add to Cart option, or Order From Supplier for desired item
- Click on View Cart, to open cart, or Checkout, if punch-out supplier
- Follow Submit Active Cart instructions below at #5

OR

EXTERNAL (PUNCH-OUT) CATALOGS

- From Shopping Home page
- In the Punch-out Catalogs area, click supplier's icon to begin punch-out session
- Search in supplier's site for items and add to supplier's shopping cart
- Follow supplier's site instructions for returning the item(s) to your active cart
- Follow Submit Active Cart instructions below at #5

OR

Worcester FORMS (NON-CATALOG)

- From Shopping Home page
- In the Worcester Forms section (at the bottom left) click on the appropriate form
- Read form's Instructions (on left of form)
- Select from Available Actions, Add and Go to Cart to enter one item
- Select Add to Cart, if you have more than one line item, and continue adding items using the same form. After the last item, select Add and Go to Cart
- Click Go

4) Modifying an Active Cart (not all steps in this section are required)

REMOVE ITEMS FROM CART

- Open Active Cart
- Click Check box to the right of Ext. Price of items that you want to remove
- Select Remove Selected Items from the Remove button or the For Selected Line Items drop down menu
- Click Go

APPLY CONTRACT AND COMMODITY CODES TO ITEM(S)

When using a form

- After selecting a supplier
- Click Select Contract
- Choose applicable Contract #
- Click Ok

For punch-out item, catalog or non-catalog item already added to the cart

- Click Select Price or Contract before clicking Proceed to Checkout
- Choose applicable Contact# (if applicable)
- Enter the Commodity Code from the Commodity Code drop down menu
- Note: you would look up the Commodity Code up via the Crosswalk from Account Code To Commodity Code before clicking Proceed To Checkout
  - Look at the Account Description column and the corresponding Commodity Code to select from the Crosswalk
  - Then use the Commodity Code drop down to select the appropriate Commodity Code on your requisition
- Click Ok
- Click Save

CHANGE PRODUCT QUANTITY

For Catalog items only already added to cart

- Modify number in Quantity field and Click Save

For Form Quantities and Amounts Already Added to Cart

- Click on the Product Description of item to open the form
- Modify the quantities and/or amounts
- Select Save in the drop down menu and click Go
- Close the form window – continue with Step # 5

For Punch-out items – not available for all punch-out suppliers

- Click Modify Items (above Product Description field)
- Modify quantity
- Click Checkout / follow supplier's check out procedures **OR**
- Remove items from cart
- Return to supplier's punch-out site to add necessary quantities

MODIFY ACCOUNTING CODES AT THE HEADER

- Click Proceed to Checkout
- Click Accounting Codes tab at top
- Click Edit in the Accounting Codes box (the top codes is the Header level)
- Enter the appropriate code in the corresponding box (enter Speedtype and Account Code) OR
- Click Edit, then, Click Select Profile Values, Select a CU Value or Select From Your Code Favorites for pre-saved values
- Click Save

SPLITTING ACCOUNTING CODES AT LINE

- Click on Accounting Codes tab
- Click Edit at line (this will apply to the line and override the Header values)
- Click Add Split
- Select % of Qty, % of Price, Amount of Price, or Amount of Qty
- Click Select Profile Values or Select a CU value or Select from your code favorites to choose pre-saved values for accounting codes
- Enter correct % or amount beneath the price/quantity drop down menu for each chart string
- Click Save to confirm changes

ADD INTERNAL NOTES AND/OR ATTACHMENTS

- Click Proceed to Checkout
- In the Internal Notes and Attachments section, click Edit button
- **Add** a note
- Click Save **OR**
- Click Add Attachment
- Click Browse to find attachment
- Choose attachment
- Click Save

ADD EXTERNAL NOTES (TO SUPPLIERS)

External notes and attachments are for forms or non-catalog items only

- Click Add Attachment
- Click Browse to find attachment
- Choose attachments
- Click Save

5) Submit or Assign An Active Cart

- Once lines/items have been added to cart and modified if necessary
- Click Go to Final Review or Proceed to Checkout button above order and review order for accuracy
- Click Assign Cart to Requisitioner and select assignee, add note to requisitioner if needed
- Click Assign **(NOTE: Shopper Role Privileges Stop Here)**

OR

For Requisitioners - skip previous step, click Submit Req for Approvals

6) Tracking a Requisition – Requisitioner Role Starts Here

FIND A REQUISITION

- Click Orders and Documents Icon (at the left)
- Click Search Documents
- Choose My Requisitions, All Records, etc.
- Select a Date Range at the left
- You can filter the search by Supplier, Prepared By, Approved By, etc.
- Click the Requisition Number link
- View the summary detail, approval status or history and add comments if needed

(7) Withdrawing a Pending Requisition

WITHDRAW ENTIRE REQUISITION

- Click Orders and Documents icon (to the left)
- Click Search Documents, then My Requisitions
- Click the Requisition Number link
- In Available Actions drop-down menu, select Withdraw Entire Requisition
- Click Go
- In message box **type your reason**
- Click Withdraw Entire Requisition

WITHDRAW A LINE

- Click Orders and Documents icon (to the left)
- Click Search Documents, then My Requisitions
- Click the Requisition Number link
- Check the appropriate **checkbox** to the right of item price
- In For Selected Line Items drop-down menu, Select Withdraw Selected Items
- Click Go
- In message box **type your reason**
- Click Withdraw Line Items

***To learn the BuyWays system, access the Test Site and follow the provided BuyWays Examples.**

BuyWays SHOPPER Example I

I. **Fisher Scientific – Create an External (PUNCH-OUT) CATALOG Order (Shopper)**

1) Follow "#1 Getting Started" Instructions from Training Guide

2) Follow "#2 – Profile Set-Up" Instructions from Training Guide

3) Shopping – Creating a Cart

EXTERNAL (PUNCH-OUT) CATALOG ORDER

- From Shopping Home page
- Use the **Shop** bar at the top, click on My Carts and Orders and click on Open My Active Shopping Cart
- In the Name This Cart box, rename your cart by entering **Your Last name-Fisher**, click Update
- Click on the link Click Here To Start Shopping
- In the Punch-out Catalog: Fisher Scientific icon to begin punch-out session
- Search in Fisher Scientific supplier's site for item/catalog # **07200573** and click to **search**
- The following item will appear:
    - **Stripette Paper-Wrapped Disposable Polystyrene Serological Pipettes**
    - Note: **In Stock**
    - Enter **2 cases in** QTY box
    - Click Add To Cart
- Perform another search in Fisher Scientific supplier's site for item/catalog # **19049583** and click to **search**
- The following item will appear:
    - **Fisherbrand Dotted Canvas Gloves**
    - Note: **In Stock**
    - Enter **3 dozen in** QTY box
    - Click Add To Cart

Return to BuyWays Site

- Click on the **Shopping Cart icon**
- Click on Return Cart to Purchasing Application
- Click on Submit

4) Modifying an Active Cart

APPLY CONTRACT AND COMMODITY CODES TO ITEM(S)

Enter Key Information

- **Back in BuyWays**
    - Enter the Commodity Code: **Lab/Research Supplies** from the Commodity Code drop down menu
    - **Note:** you would look up the Commodity Code up via the Crosswalk from Account Code To Commodity Code before clicking Proceed To Checkout
    - Look at the **Account Description** column and the corresponding **Commodity Code** to select from the Crosswalk
    - Then use the Commodity Code drop down to select the appropriate Commodity Code on your requisition
    - Review the **workflow menu bar** at the top of the screen
    - Go to Account Codes tab, click Edit
        - Enter Speedtype: **119830-WA** (Note: you will know your department **Speedtype)**
        - Enter Account Code: **739600-WA** (Note: you will know your department **Account Code)**
        - Click Save

5) Submit or Assign An Active Cart

- Once lines/items have been added to cart and modified if necessary
- Click Go to Final Review or Proceed to Checkout button above order and review order for accuracy
- Click Assign Cart to Requisitioner and select assignee (you may Search For Assignee **Last Name** (i.e. Requisitioner 8)
- Add to profile
- Add Note To Assignee if needed
- Click Assign **(NOTE: Shopper Role Privileges Stop Here**)

6) Unassign and Modify a Submitted Cart

Unassign Your Cart

From Shopping Home page

- Use the **Shop** bar at the top, click on My Carts and Orders and click on View Draft Shopping Carts
- Find **Your Last Name-Fisher**
- Click on Unassign cart

Delete an Item From Your Cart

Delete Fisherbrand Dotted Canvas Gloves

- Click on the Remove button located to the left of the item
- Click on Proceed to Checkout

Assign Cart

- Click Assign Cart
- Add Note To Assignee**: Deleted Gloves**
- Click Assign

BuyWays SHOPPER Example II

II. Sigma Aldrich – Create an External NON CATALOG Order (Shopper)

1) Follow "#1 Getting Started" Instructions from Training Guide

2) Follow "#2 – Profile Set-Up" Instructions from Training Guide

3) Shopping – Creating a Cart

EXTERNAL (NON-CATALOG) Order

- From Shopping Home page
- Use the **Shop** bar at the top, click on My Carts and Orders and click on Open My Active Shopping Cart
- In the Name This Cart box, rename your cart by entering **Your Last name-Sigma Aldrich**, click Update

SHOP FOR AN ITEM NOT AVAILABLE IN A CATALOG

- Click Add Non-Catalog Item
- In the Non Catalog Item **box**:
  - Enter **Vendor box**: Sigm (Sigma Aldrich will roll down)
    - Click Distribution Methods (if manual, will not automatically go to the vendor)
  - Enter in Product Description box: **Very Specific Microscope**
  - Enter in the Catalog No. box: **12345** (NA if there is not catalog #)
  - Enter Quantity box: **1**
  - Enter in the Price Estimate box: 5,100.00
  - Enter in the Packaging box: EA-Each
- Save and Close the box

4) Modifying an Active Cart

Associate a Contract

- Click Choose Contract
- **Select: MHES-D25 (Lab Equipmant)**
- Click Ok

APPLY COMMODITY CODES AND COST CENTER TO ITEM(S)

Verify Commodity Code

- Go to **Home/Shop** (house icon) on left side screen
- Under Procurement Forms (scroll down on left bottom corner of screen), click Worcester
- Review **Commodity Code Cross Walk**
  - Review **column B**, find **763210**
    - Account for **research equipment/equipment capital (Excludes IT)**
- Return to your cart
  - Click **cart icon**
  - Mouse over My Carts and Orders
  - Click Open My Active Shopping Cart
  - Select the **Commodity Code**: **Equipment Capital (Excludes IT)**
- Proceed to Checkout
- Review the workflow menu bar for issues
- Go to Account Codes tab, click Edit
- Enter Speedtype: **119830-WA** (Note: you should know your department **Speedtype)**
- Enter Account Code: **739600-WA** (Note: you should know your department **Account Code)**
- Do not need to touch any other fields
- Click Save

ADD EXTERNAL ATTACHMENT AND INCLUDE YOUR QUOTE ID IN NOTES

Add External Attachment

- From the workflow menu bar, click External Notes and Attachments
  - Click Add Attachments, click Select files
  - Attach a file from your desktop, click Save Changes
  - Click Edit, Add Note, Save

Assign Cart and Include Your Quote ID In Notes

- Assign Cart to a Requisitioner (refer to Training Guide if needed)
  - Include the Quote ID in the notes, Assign
- Go to My Carts and Orders
- Click Open My Active Shopping Cart

Unassign Cart and Reassign Cart

- Click Unassign, Proceed to Checkout, click PR Approvals tab
  - View Approvers, Close
- Click Assign Cart (to reassign the cart)

BuyWays REQUISITIONER Example I

III. Fisher Scientific – Act on Your Fisher Shopper Cart (Requisitioner)

1) Follow "#1 Getting Started" Instructions from Above but Login as a Requisitioner

2) Act on the Fisher Shopper Fisher Cart

Find Carts Assigned to You

- Click Action Items, then Carts Assigned to Me
- Find your **Fisher** cart, and click the cart name

Return Cart

- Click Return Cart, then Cancel

Review Information

- Review Commodity Code and click Proceed to Checkout

- Review information on Requisition tab, Summary
    - Open Comments tab, read notes from Shopper

Create a Split Distribution

- Click the **Accounting Codes** panel's **edit** button
    - Click Add Split
    - Select % of Quantity
    - Enter **50** in the **% fields**
    - Update the second Speedtype to **118101**
        - Retain the same **Account Code**
- Click Save

Submit Requisition

- Click Submit Requisition
- Click Approvals Tab

BuyWays REQUISITIONER Example II

IV. Sigma Aldrich – Act on Your Sigma Aldrich Shopper Cart (Requisitioner)

1) Follow "#1 Getting Started" Instructions from Above but Login as a Requisitioner

2) Act on the Sigma Aldrich Shopper Cart

Find Carts Assigned to You

- Click Action Items, then Carts Assigned to Me
- Find your **Sigma Aldrich** cart, and click the cart name

Review Information

- Review Contract
- Review Commodity Code and click Proceed to Checkout
- Review information on Requisition tab, Summary
  - Open External Notes tab
  - Note attached file
- Click Final Review

Submit Requisition

- Click Submit Requisition
- Click Approvals Tab
  - In the Department Approval box, click View Approvers

BuyWays REQUISITIONER Example III

V. Create a Blanket Order (Requisitioner)

Create a Cart

- Create a cart, rename it: **Your Last Name-Charles River**, click Update

Shop for an Item Not Available in a Catalog

- Click Add Non-Catalog Item
- In the Non Catalog Item box:
  - Enter Vendor: **Charles R** ("Charles River Laboratories" will roll down)
    - Review Distribution Methods
    - Product Description, enter: **Lab Testing**
    - Catalog Number, enter: **NA**
    - Quantity, enter: **1**
    - Price Estimate: enter **10,000.00**
    - Packaging: EA - Each
- Save and Close the box

Enter the Commodity Code

- Operational Services
- Click Proceed to Checkout

Review the Workflow Menu Bar for **Alerts**

Enter Financial Information

- In the Accounting Codes panel, click **Edit**
  - For Speedtype, enter: **119830-WA**
  - For Account Code, enter: **761250-WA**
  - Click Save
  - Click the Summary tab, or Final Review

Define the Blanket Order

- In the General panel, scroll down to Blanket Order
  - Click, Edit
  - Check the box next to Blanket Order (**Qty must = 1)**
  - Check the box next to Confirming /Not Sent To Vendor
  - Click, Save

Search for an Account Code

- In the Account Codes panel
  - Click Edit
  - Under Speedtype, click Select From All Values
  - In the description field, enter Lab
  - Select Lab Services for (761250-WA)
  - Click, Save

Create a Blanket Order

Withdraw the Order

- Click, Submit Requisition
- Open the Requisition
- Under Available Actions, select Withdraw Entire Requisition
- Click, Go
- Enter a note describing reason for withdrawal
- Click, OK
- Click, Close

Copy the Order to a New Cart

- In the Summary tab, scroll down to Vendor/Line Item Details
- In the Product Description panel, click the boxes on the far right
- From the For Selected Line Items drop down menu
- Select, Make Changes and Resubmit